

**IN THE UNITED STATES DISTRICT COURT  
FOR THE SOUTHERN DISTRICT OF OHIO  
WESTERN DIVISION**

The Western and Southern Life Insurance :  
Company, et al., :  
: Case No. 1:23-cv-742  
*Plaintiffs,* : Judge Jeffery P. Hopkins  
vs. : Chief Magistrate Judge Stephanie K.  
Ronald J. Sagasser, et al., : Bowman  
: :  
*Defendants.* :

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**SCHEDULING ORDER**

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This matter is before the Court on the Report and Recommendation (Doc. 50) issued by Chief Magistrate Judge Stephanie K. Bowman on May 6, 2025. The Magistrate Judge recommends that the Court adopt the discovery deadlines proposed by the parties in their Rule 26(f) Report filed November 12, 2024. Magistrate Judge Bowman represents that all parties agree that a Calendar Order is appropriate at this time, and the dates proposed in the Rule 26(f) report are suitable.<sup>1</sup>

Having reviewed the Magistrate Judge's recommendation and finding no clear error, the Court hereby **ADOPTS** the Report and Recommendation and sets the following deadlines:

**PERTINENT SETTINGS**

Plaintiffs' expert report(s) and designation(s): **October 29, 2025**

Defendants' expert report(s) and designation(s): **November 10, 2025**

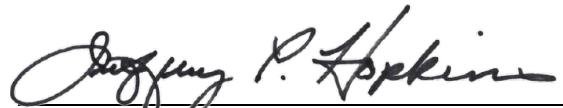
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<sup>1</sup> Because Magistrate Judge Bowman represents that all parties agree to these dates, and thus that no objections to the R&R will be forthcoming, the Court need not wait until after expiration of the deadline for submitting objections to enter this Order.

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| Rebuttal expert report(s) and designation(s):  | <b>30 days after any affirmative report</b> |
| Deadline for fact discovery:   | <b>September 29, 2025</b>                   |
| <i>The inadvertent production of any material otherwise protected by the attorney-client privilege, work-product doctrine, or any other applicable privilege or protection against disclosure is not a waiver of any applicable privilege or protection against disclosure. The parties shall work cooperatively to resolve any inadvertent production issues.</i> |   |
| Deadline for expert discovery:   | <b>January 26, 2026</b>                     |
| Dispositive motion deadline:   | <b>February 23, 2026</b>                    |
| <i>Motions for summary judgment shall not be filed before the close of discovery without leave of Court. See Standing Order Governing Civil Cases.</i>   |   |
| Final Pretrial Conference:   | <b>May 2026</b>                             |
| Jury Trial:  | <b>To be determined</b>                     |

**IT IS SO ORDERED.**

Dated: May 20, 2025



Hon. Jeffery P. Hopkins  
United States District Judge